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# World Production and Trade

Sta

United States  
Department of  
Agriculture

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Agricultural  
Service

Washington, D.C. 20250

Weekly  
Roundup

WR 27-87

July 8, 1987

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

## GRAIN AND FEED

PORTUGAL'S Corn Imports Fall but Non-grain Feed Imports Surge. Feed use of corn in Portugal, which has dropped by nearly 50 percent since 1980/81 (July/June), probably will continue to decline as a result of competition from non-grain feed ingredients (NGFI). Consequently, corn imports during 1986/87 are expected to drop. Already in the first 3 months of calendar 1987, U.S. exports of corn to Portugal were 55 percent below the same period in 1986. However, U.S. exports of NFGIs, primarily corn gluten feed, during the same period were up by nearly 70 percent and are expected to increase further.

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PHILIPPINE Ban on Corn Imports Temporarily Suspended. The Philippine government has decided to temporarily resume imports of corn after a two-year ban. In the five-year period (1980/85) before the ban, the Philippines annually imported 200-500,000 tons of corn, with about two-thirds supplied by the United States.

## OILSEEDS AND PRODUCTS

ARGENTINA May Eliminate Export Taxes. According to the U.S. agricultural counselor in Buenos Aires, sources report that Argentina may announce the long-awaited elimination of export taxes on a number of commodities including oilseeds in late August. The elimination is not expected to cause a major increase in crops planted. But it may stop or slow the recent decline in planted crop area because it will partially offset low international grain prices.

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Higher FRENCH Feed Pulse Output Could Cut Soybean Imports. The U.S. agricultural counselor in Paris reports that France's feed pulse area for 1987/88 has been revised significantly upward based on data released by the French government. This year's area is now estimated at 451,000 hectares, up 44 percent from 1986. On a protein equivalent basis, the increase could represent 10 percent of French soy meal consumption, resulting in reduced demand for U.S. soybeans and soybean meal. Actual use will depend on price and export demand. Typically more than half of the France's feed pulse production is exported, mainly to West Germany and the Netherlands.

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KENYAN Budget Changes Improve Potential for Increasing Soybean Imports. The U.S. agricultural attache in Nairobi reports that the Kenyan minister of finance's message on the budget stressed indirect taxation and encouraged increased production of crops to meet domestic requirements and exports. Noted in this year's budget was the elimination of import duties and sales taxes on soybeans and soybean cakes and meals. However, the duty on soybean oil was raised. The import duty on soybeans previously was set at 40 percent.

#### DAIRY, LIVESTOCK AND POULTRY

USSR Meat Production Up While Animal Numbers Are Down. In the USSR, meat production on state and collective farms for January-May was up 8 percent according to the Soviet Economic Gazette. For individual meats, beef production was up 10 percent, pork was up 7 percent and poultry meat was up 3 percent. Production of sheep and goat meat was down 7 percent. For the January-May period, milk production was up 3 percent with all of the increase due to higher yields per cow. Output of eggs was up 3 percent due to more hens. Compared to last month's report, growth in beef production is slightly slower, that of pork slightly higher, and the rate of increase in milk production declined from 5 percent to 3 percent.

Cattle on state and collective farms on June 1 were reported at 99.2 million head, 0.4 million below June 1986, while cow numbers, at 29.1 million head, were 0.3 million below last year. June 1 hog numbers were 58.6 million head, down 0.9 million from 1986. Poultry numbers were 1 percent above June 1986.

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ARGENTINA To Maintain Beef Exports. Argentina's beef exports for 1987 are not expected to suffer since reported outbreaks of foot-and-mouth disease declined in June. Argentine beef and veal exports for 1987 are forecast at 300,000 tons, up from 251,000 tons in 1986. Beef exports during January-April 1987 totaled 101,000 tons, up from 76,000 tons during the same period last year. Beef shipments to the European Community (EC) are not expected to be affected by the disease outbreaks that began in May. In 1986, Argentina exported 77,000 tons of fresh, chilled, frozen and prepared meat to the EC and 88,300 tons of processed beef to the United States.

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EGYPT'S Tallow Imports To Increase. Egypt's tallow imports for 1987 are forecast at 175,000 metric tons, up from 121,000 in 1986, according to the U.S. agricultural counselor in Cairo. This assumes adequate foreign exchange reserves. Increased consumption, lower beginning stocks and a smaller growth in palm oil imports are behind the forecast increase. Since the United States supplies most of Egypt's tallow, U.S. exports to Egypt also are forecast up. U.S. tallow exports to Egypt during January-April 1987 totaled nearly 68,000 tons, up sharply from the same period last year. U.S. tallow shipments to Egypt dropped 31 percent in 1986 due to Egypt's balance of payment problems and higher palm oil imports. Egypt is the leading market for U.S. tallow, with U.S. exports valued at \$41.8 million in 1986.

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IRAQ'S Broiler Production Declined in 1986. During 1986, Iraq's broiler meat production was down over 10 percent, according to a report from the U.S. agricultural attache in Baghdad. Egg production was up about 12 percent but that is considerably less than the 25-percent increases that have been common in recent years. Problems for both sectors were caused by a cut-off in credit availabilities from Europe that limited imports of hatching eggs and veterinary supplies, a summer that was hotter than normal and continuing difficulties with feed distribution. Improved scheduling of imports of hatching eggs and feedstuffs is expected to facilitate 1987 broiler production of 125,000 tons, the same as in 1985, and egg production of 1.2 billion eggs, up 25 percent from 1986.

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## COTTON AND FIBERS

NIGERIA'S Policy Changes Expected To Encourage Expanded Cotton Output. A Nigerian program which resulted in the abolition of commodity boards and import licenses and a sharply devalued Naira is expected, at least in the short run, to boost small-scale cotton output in Nigeria, according to the U.S. agricultural attache in Lagos. Previously, the overvalued Naira resulted in subsidized imports which discouraged local production. During the 1987/88 season, some small farmers will probably shift from sorghum and corn to cotton, particularly since rains were late for corn. Cotton area is projected to increase 28 percent over last year to 365,000 hectares. Production is estimated at 165,000 bales, 33 percent more than the output of 1986/87. Increased output also is expected due to an increase in cotton prices. Reports indicate that last year some farmers received prices of about 1,200 Naira per ton, compared with 850 per ton the previous year. (As of March 1987, 1 Naira = U.S.\$3.905.) It is not clear what impact these changes will have on large-scale farming operations since the devaluation sharply increases management and input costs for these farmers.

## TOBACCO

ISRAEL'S Tobacco Crop Near Last Year's. Israel's 1987 total unmanufactured tobacco crop is forecast at 600,000 tons, slightly below last year, according to the U.S. agricultural attache in Athens. Israel produces only rainfed oriental tobacco on soils which are generally unsuitable for other commercial crops, except olives. Since production usually amounts to less than one-tenth of consumption requirements, imports are necessary.

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CHILE'S 1987 Tobacco Production Forecast Up. Chile's 1987 total unmanufactured tobacco crop is forecast at 9,681 tons, 21 percent above last year's revised crop estimate of 7,980 tons, according to the U.S. agricultural attache in Santiago. Much of the increase is attributed to a 9-percent increase in planted area. All of Chile's tobacco is produced under contract with Chiletobaccos, a subsidiary of the British-American Tobacco Company. Burley tobacco, which represents 62 percent of this year's output, is expected to increase 15 percent; plantings are projected up 14 percent. Larger export contracts are primarily responsible for the sharp increase in plantings.

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COSTA RICA'S 1987 Tobacco Output Forecast Near Last Year's. The 1987 total unmanufactured tobacco crop in Costa Rica is forecast at 1,909 tons, slightly below last year's revised crop estimate of 1,912 tons, according to the U.S. agricultural attache in San Jose. The majority of the tobacco is grown by small-scale producers in the Puriscal, Parrita and Perez Zeledon areas. All tobacco is purchased by two local tobacco companies, the Republic Tobacco Company and Tabacalera Costarricense.

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# EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of July 1, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS
69. Israel wheat	May 29, '87	200,000
68. Bangladesh wheat	May 22, '87	100,000
67. Soviet Union wheat	Apr. 30, '87	4,000,000 COMPLETE
66. Turkey rice	Apr. 3, '87	70,000
65. Colombia barley malt	Apr. 3, '87	15,000
64. Iraq table eggs	Feb. 20, '87	189 million eggs
63. Canary Islands poultry	Feb. 9, '87	5,000 Sold 1,000
62. Nigeria wheat	Jan. 28, '87	500,000
61. China wheat	Jan. 26, '87	1,000,000 COMPLETE
60. Iraq wheat	Jan. 16, '87	800,000 Sold 605,000
59. Switzerland barley or sorghum	Jan. 16, '87	250,000 Sold 9,000
58. Poland wheat	Jan. 7, '87	500,000 COMPLETE
57. Poland barley or sorghum	Dec. 31, '86	200,000 Sold 137,000
56. Romania wheat	Dec. 23, '86	250,000
55. Iraq poultry	Dec. 22, '86	60,000 COMPLETE
54. Dominican Republic table eggs	Dec. 9, '86	25 million eggs Sold 11.1 million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000 Sold 6,000
52. Tunisia barley	Dec. 1, '86	150,000
51. Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head Sold 740
50. West Africa (Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Ghana, Gabon, Liberia, Niger, Togo) wheat	Oct. 30, '86	345,000 Sold 95,750
49. Dominican Republic poultry	June 15, '87	185,000
48. Philippines barley malt	Oct. 29, '86	1,500 Sold 1,133
47. Cameroon wheat flour	Oct. 20, '86	60,000 Sold 25,000
46. Romania barley	Oct. 14, '86	20,000
45. Venezuela barley malt	Sept. 24, '86	200,000 Sold 125,000
44. Cyprus barley	Sept. 4, '86	100,000
43. Canary Islands wheat	Aug. 26, '86	150,000 Sold 118,000
42. Egypt semolina	Aug. 8, '86	100,000
41. Soviet Union wheat	Aug. 6, '86	30,000 Sold 23,000
40. Canary Is. dairy cattle	Aug. 1, '86	4,000,000 EXPIRED
39. Hong Kong table eggs	July 28, '86	3,000 head Sold 2,825
38. Senegal wheat	July 28, '86	44 million COMPLETE
37. India vegetable oil	July 28, '86	eggs
	July 17, '86	100,000 COMPLETE
	July 8, '86	25,000 COMPLETE

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

36. Jordan barley	June 17, '86	60,000	
35. Israel barley	June 17, '86	200,000	Sold 107,324
34. Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33. Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32. Sri Lanka wheat	May 16, '86	125,000	COMPLETE
	March 5, '87	95,000	Sold 85,000
31. Saudi Arabia barley	May 7, '86	500,000	COMPLETE
	Aug. 6, '86	250,000	COMPLETE
	Sept. 16, '86	300,000	COMPLETE
	Oct. 8, '86	200,000	COMPLETE
			(201,000)
	Jan. 5, '87	1,250,000	COMPLETE
	May 15, '87	500,000	COMPLETE
30. Algeria barley	Apr. 17, '86	500,000	Sold 36,000
29. Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28. Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
	June 18, '86	5,000 head	
27. Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
	Sept. 12, '86	10,000 head	Sold 2,801
26. Yemen poultry feed	Apr. 14, '86	150,000	Sold 108,668
25. Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
	June 24, '86	200,000	COMPLETE
	Oct. 7, '86	500,000	Sold 213,050
24. Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
	June 18, '87	8,000 head	COMPLETE
23. Syria wheat	Apr. 8, '86	700,000	CANCELLED
22. Benin wheat (remaining 15,000 tons transferred to West Africa	Apr. 7, '86	45,000	COMPLETE
21. Algeria table eggs	Apr. 4, '86	500 million eggs	
20. Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 2,028
19. Jordan wheat	Mar. 19, '86	75,000	COMPLETE
	June 20, '86	75,000	COMPLETE
	Dec. 31, '86	225,000	COMPLETE
18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 300,000
17. Algeria wheat flour	Feb. 25, '86	100,000	
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE
			(152,400)
14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 17, '86	40,000	COMPLETE
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 23,764
12. Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 75,000

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	COMPLETE
	Feb. 27, '87	6,000	
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	Sold 15,000
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
	Jan. 13, '87	60,000	
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	COMPLETE
	July 1, '87	500,000	
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	COMPLETE
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
	May 18, '87	100,000	Sold 50,000
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE (512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	COMPLETE
	Oct. 8, '86	1,000,000	COMPLETE
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 616,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	COMPLETE

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EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced as of July 1, 1987

Announced to Date    28,785,680 tons grains and products (grain equivalent)  
                          758 million table eggs  
                          140,500 tons frozen poultry  
                          65,500 head dairy cattle  
                          25,000 tons vegetable oil

Sold to Date            16,426,309 tons wheat  
                          1,593,196 tons flour (grain equivalent)  
                          3,427,324 tons barley  
                              72,610 tons semolina (grain equivalent)  
                              64,996 tons barley malt (grain equivalent)  
                          106,000 tons sorghum  
                              38,700 tons rice  
                          108,668 tons poultry feed  
                              25,000 tons vegetable oil  
                          130,133 tons frozen poultry  
                              47,894 head dairy cattle  
                          54,572,004 table eggs

Total Sales Value:            \$2,079.4 million  
Estimated Bonus Book Value:   \$1,391.7 million  
Market Value of Awards:        \$991.2 million

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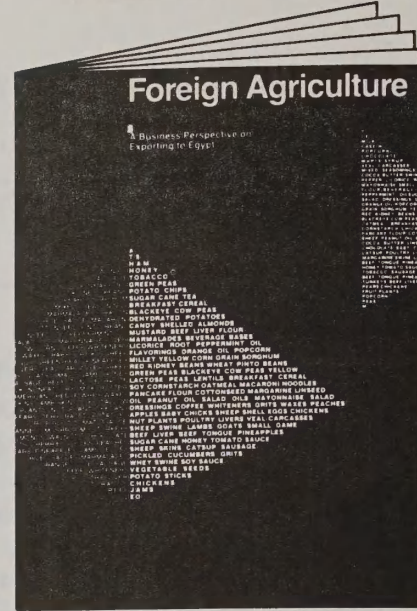
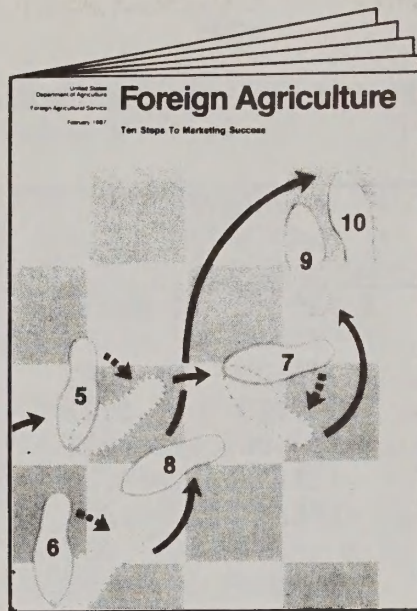
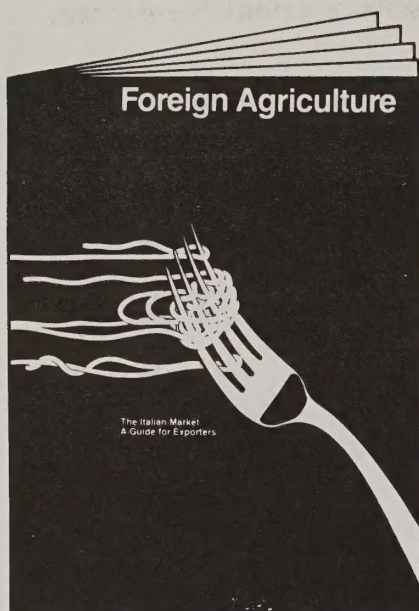


Selected International Prices

Item	: July 7, 1987		: Change from	: A year
			: a week ago	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT	\$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.	144.00	3.92	+3.00	N.Q.
U.S. No. 2 DNS/NS: 14%....	137.00	3.73	+2.00	128.50
U.S. No. 2 S.R.W. ....	124.00	3.37	+7.00	115.50
No. 3 H.A.D.....10/	151.00	4.11	-4.00	138.00
Canadian No. 1 A: Durum11/	156.00	4.25	+1.00	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	N.Q.	--	--	98.00
Soybeans and meal:				
U.S. No. 2 Yellow.....	225.45	6.14	+5.80	203.40
Brazil 47/48% Soya Pellets	217.00	--	+1.00	184.50
U.S. 44% Soybean Meal..12/	207.00	--	+4.00	178.50
U.S. FARM PRICES 3/				
Wheat.....	86.71	2.36	-1.10	87.07
Barley.....	59.71	1.30	-1.84	56.03
Corn.....	61.02	1.55	-4.33	78.74
Sorghum.....	56.00	2.54 2/	-2.65	75.40
Broilers.....	1,100.10	--	+82.67	1,555.35
EC IMPORT LEVIES				
Wheat 5/.....	201.35	5.48	-26.40	157.97
Barley.....	195.66	4.26	-27.79	157.52
Corn.....	200.63	5.10	-2.52	154.61
Sorghum.....	208.68	5.30	-2.79	166.48
Broilers 4/ 6/ 8/.....	514.00	--	-4.00	349.00
EC INTERVENTION PRICES 7/ 9/				
Common wheat(feed quality)	192.62	5.24	-25.46	200.08
Bread wheat (min. quality)	202.75	5.52	-25.49	212.48
Maize.....	202.75	5.15	-25.49	212.48
Barley and all other feed grains, excluding maize.	192.62	--	-25.46	200.08
Broilers 4/ 6/.....	1,591.00	--	+27.00	1,422.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat .....	N.A.	--	--	N.A.
Barley.....	N.A.	--	--	N.A.
Broilers 4/ 6/ 8/.....	418.00	--	-3.00	257.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ August delivery. 11/ September/October shipment. 12/ July/September shipment. N.A.=None authorized. N.Q.=Not quoted. Note: Basis July delivery.





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